

**SHARPENING OUR SAW  
GLBET STRATEGIC PLANNING MEETING**

Notes from Meeting of the Great Lakes Basin Ecosystem Team Executive Committee  
and Other Very Important People  
April 1 and 2, 2003

**“Some believe we have lost sight of the Service’s goal of ecosystem management–**

*to work closely with others to carry out our mission and mandates, and strive to  
contribute to the effective conservation of natural biological diversity through  
perpetuation of dynamic, healthy ecosystems. (FSM 251 Part 052)*

**Ecosystem management is an adaptive process. We should reflect on our successes and failures and let the lessons learned from our history lead us to further achievement of our goals ... to ensure that the Ecosystem Approach in this region provides flexibility, fosters creativity, uses sound science, and that the needs of the field are supported.”**

**-- Bill Hartwig**



***Setting our Course on the Great Lakes***

Unfortunately, it became necessary to postpone (not cancel) our long planned Team Meeting session with the Region 3 Regional Management Team and other Program Leaders the first week of April. We deeply regretted and apologized for any and all inconvenience caused.

This change in plans was due to two recent developments that dictated our implementing some creative “adaptive management.” These two developments were: 1) The ongoing transition of Regional Directors. Our new Region 3 Regional Director would not be available for our meeting, and getting Region 3 Regional Management Team commitment for participation was therefore complicated. 2) The current budget situation and concerns regarding recent directives for reducing travel resulted in numerous key Team Members stating that they would have to cancel their planned participation. Out of necessity then, we had to change our plans.

The GLBET many successes and accomplishments have received wide recognition and praise both inside the Service, and especially with our many partners that we have effectively worked with on Team landscape level initiatives. We know you are aware of our many Lake Sturgeon, Islands, Outreach, and GIS/DSS Committees recent accomplishments. Particularly the two hugely successful Team Workshops in December on Islands Conservation and Lake Sturgeon Restoration which all our Committees participated in, and the numerous resulting exciting partnership actions that are ongoing and in the works.

We aren't "broke," and so we don't need major "fixing." But, a major reason our many successes have been realized is that we are good at adapting, and constantly seeking to better ourselves in serving our Service Mission, both Regions, Programs, Great Lakes Field Stations, and strong landscape level Great Lakes partnerships.

So what we did in place of the long planned full Team Meeting in Minneapolis, was to convene our Team Executive Committee and others interested and available, to participate in a "sharpen our saw" meeting. We explored and discussed how the Team can better engage and support our two Regions, Programs, and 44 Field Stations in the Great Lakes for Service priorities such as the new Fisheries Vision, NWR Centennial, International Wildlife Refuges, and Migratory Bird Conservation, and many important partnership initiatives.

We also explored our new and upcoming Team initiatives and priorities for Migratory Bird Conservation, Invasive Species, Endangered Species, Coastal Habitat Restoration, and Great Lakes Funding and Support Coordination, and for additional opportunities for landscape level partnership efforts. The Chairs for each of our existing Committees have coordinated the formulation of actions for inclusion into our revised Team Action Plan. Team Members have also stepped up to identify new actions for getting new Team Committees/Initiatives underway. The proposed revised Team Action Plan which we were going to complete together that week was compiled and provided to each of you for your review and comment (see on our Team Web Site).

Team, Service Management, Programmatic, Field Station, and Partners input will be solicited on how we will conduct Team business, including future meetings. Options for your consideration will be developed. Based on what we develop with all your input, we will together make our decisions on how we proceed into the future. Thank you for your understanding, and for all the great things you help make happen for the globally significant Great Lakes!

In deciding to go forward and still meet in Minneapolis, the GLBET Executive Committee wanted to use the opportunity presented to "sharpen our Team saw." We did view our circumstances as an opportunity, to step back and examine where we have been, evaluate what has worked well and what can be done better. As captured in the meeting summary below, you can see that we have decided to be proactive, adaptive, and to go forward with our hard good work in our efforts to help restore the greatness to the Great Lakes.

**Meeting Participants:** Mike Hoff, Leslie Tewinkel, Bob Krska, Rachel Levin, Ed Christoffers, David Stilwell, Tom Magnuson, Craig Czarnecki (via phone), and Rich Greenwood. Also joined for Migratory Bird discussions by Steve Lewis, Bob Russell, and Tom Will.

### **Is the Ecosystem Team concept still relevant to advancing the Service's Mission in the Great Lakes?**

Must address the question: What does the uncertainty of Upper (WO) and Regional management's support for the ecosystem approach concept, in general, and the GLBET, in particular, mean for the GLBET?

#### **Role of the Team**

How should we adapt to maximize our relevance?

#### **Need to develop a Mission Statement**

What is the role of the GLBET relative to the Service's mission in the Great Lakes?

**Cornerstone:** Team coordinates and supports **large-scale (watershed, basin) initiatives and issues of opportunity** that address unmet needs of partners, stakeholders, and resources.

Need to develop **Strategic Plan** that describes our mission, goals, strategies, and measurements of accomplishments to address the long-term initiatives.

Need to better provide support for short-term needs of Team members.

Need to quickly identify issues and move quickly forward.

### **Who is the Great Lakes Basin Ecosystem Team?**

Are our past members still planning on continued participation?

Are we needing new members?

If so, what expertise do we need?

New member needs should be commensurate with the priorities established by the Team and with the short-term needs of Team members and offices.

Do we need to conduct a survey of past members to determine their level of continued interest?

Has the Executive Committee become the GLBET (in terms of enthusiasm, activity, and accomplishment)?

### **Strategize about our Future**

Need to develop some form of a strategic plan like that of the Ozark Plateau Ecosystem Team.

Vision, Mission statement, Objectives, Actions, support needs (i.e., fiscal and personnel).

May wish to develop standard operating procedures that enable new members to work effectively within the Team to accomplish their goals.

Need to continue to focus on large-scale (watershed approach??) issues and issues of opportunities.

Need to develop strategies that address those issues.

Strategies to address unmet needs.

Focus has recently been on Committees

Most accomplishments have been by committees

Committees may at some point be able to operate without the GLBET

That does not diminish the importance of the Ecosystem Team in developing Committees and their initiatives.

Should continue developing and supporting the development of committees to focus on strategies to address basin-wide scale issues with unmet needs.

Leaders of potential new committees should:

Develop the description of the issue background, need, goal, and strategies

Request of the GLBET what is needed to achieve successes of strategies

Budget

Are there nontraditional funding opportunities we can seek to fund activities of the GLBET?

### **Status of our Present Priorities**

Get summary documents of goal accomplishments, actions underway, and objectives and strategies for the next 2 years

Decide how much emphasis needs to be maintained for each, what kind of resources to be committed for the future

Do we have leadership and field office commitment to maintain actions?

### **Adding New Priorities**

New priorities generally must be self-supporting (i.e, soft funds must be found)

Do we have leaders and offices providing long-term commitment to get it done?

Will it negatively impact other efforts?

Is it value added, landscape level?

Are we uniquely qualified to get this done?

### **Promoting our Successes**

Need to articulate how the Team helps the Service accomplish its mission and goals in the Great Lakes

Describes the actions and accomplishments of the Team

Need to describe the value-added effect of the Team

Need to do this more than ever

Need strong coordinated outreach to Great Lakes delegation

Report from the Outreach Committee

Communication strategies

Listserv

Fact sheets, presentations, etc.

Can be integrated into the Team Website

### **Promoting the Support of Partners and Members that Help the Team Achieve Successes**

Need to develop Certificates of Appreciation that are presented to people who accomplish important tasks

### **Identify, Advocate for, and Support Developing Initiatives that Address Important Great Lakes Issues**

Team to lend support to others on issues of import to team (as fiscal and personnel resources allow)

Great Lakes Commission, Coastal Program, Lake level study, cormorants, migratory birds

### **Communication - Levels**

Executive Committee

Steering Committee

Full Team

Committees

Work Groups - Task Forces - Ad Hoc Groups

### **ACTION ITEMS:**

Today:

Begin draft of vision statement and goals of Team

Begin draft of the format for the Strategic Plan

Later:

Send draft format to the committees to incorporate their background and issues statements, goals, strategies and performance measures

Develop roles and responsibilities document for distribution and editing

Will help guide Team in future actions

### **GLBET Involvement in Migratory Bird Conservation (Region 3's View)**

Where can the ecosystem team add value to the efforts of the Migratory Bird program and individual field stations to address priority

Produced a document several years ago -- What can ecoteams do for migratory birds?

Islands Committee –Bob Russell and Francie Cuthbert will provide bird expertise to the teams and ensure that existing bird data are used in the identification of important islands.

Great Lakes Colonial Waterbird Survey – team members can help to coordinate and/or conduct the survey when it's re-done in the coming years.

Double-crested cormorants – past outreach efforts have been helpful. If the EIS concludes that regional cormorant management is desirable, there may be a role for the team to play in providing a forum for coordination. “Kitty” money for banding would be helpful, because nongame bird flex funds alone cannot provide the needed support.

Songbird stopover sites – Dave Ewert (TNC) is spearheading efforts to identify stopover sites, and the team could play a role in their protection and management. What can the team do to help identify important stopover sites for conservation easements and land acquisitions.

Possible GLBET initiatives: Acquire funds to determine important sites and either acquire sites or develop easements.

Conservation of Resource Conservation Priority species – the team should identify those RCP species that are especially important in the Great Lakes and focus Flex Fund proposal and field work on them. RCPs include birds that are priorities are of concern, of management interest, and declining species. Examples include: common tern (status assessment), common loon, Cerulean warbler, golden-winged warbler (status assessment is underway; bird of early successional habitat, and sedge meadows and wetlands), American woodcock (been declining), and migrant shorebirds and songbirds.

Need a comprehensive strategy (across taxa, habitats, where possible)  
research  
conservation  
restoration

All-bird conservation planning - team members should participate in state- and Regional-level Bird Conservation workshops to discuss integrated bird conservation and see what role there might be for the team as a whole. GIS efforts to identify geographic focus areas for bird habitat conservation will soon be producing information that should be useful to the team.

### **Is a Migratory Bird Committee Needed? Maybe.**

At least some bird issues can be addressed by existing committees (Islands, GIS). Ad hoc committees could be formed, if needed, to address particular issues. Team members can be periodically updated on relevant bird issues via e-mail or at team meetings by Migratory Bird Program staff.

### **Other Issues**

Two Executive Orders on Migratory Birds – Each Agency must sign their own order.

Objective: to do good things for migratory birds

## **GLBET VISIONING PROCESS**

### **Background**

The GLBET is a network of FWS, other Federal agencies, State, Tribal, and nongovernmental organizations that addresses unmet resource management needs, focused on landscape level conservation and strategic on the ground partnership actions.

### **Vision**

The vision of the GLBET is a healthy Great Lakes Basin, which is composed of sustainable mostly native species, communities, and habitats, that can be enjoyed and used by the public.

### **The Mission**

To play a leadership role in the conservation of fish, wildlife, and habitat resources in the Great Lakes with complimentary agencies and our important partners and stakeholders, at the level of the Great Lakes Basin. The Team serves as a catalyst for, and facilitator of, planning and implementing activities that address basin-wide scale natural resource issues and problems. (Take the '99 Ecosystem Task Force bullets and implement those into the mission.)

To incubate and advocate for issues that are important, but have unmet needs and needs that require expedited actions

The Mission of the GLBET is to work with others to protect healthy species, communities, and habitat, and restore and rehabilitate those that are damaged.

### **Goals**

Help accomplish resource management actions that would either not have been implemented, or would not have been implemented as quickly

Identify audiences and communicate to them how effective we are—have as a goal to be “recognized” by these audiences as leaders in the field

**ACTION ITEMS:** Ask for testimonials from partners and other constituents – statements praising or endorsing the Team’s effectiveness.

Consider sending out an evaluation form for partners to complete after they have worked with the Team on a project. If they’re satisfied, ask them to send a letter to the RD(s).

Challenge is that partners may have different expectations from their interaction with Team. Hard to have one size fits all evaluation for multiple audiences. Whose needs are we trying to meet? Need to establish what peoples’ expectations are before asking whether we met them.

Track responses, follow up if we notice a lot of negative evaluations in one particular area. Follow up with partners on particular projects and ask them to evaluate our role in the project (i.e., lake sturgeon restoration)

Customer service should apply to biological staff as well as admin people.

Incorporate feedback queries onto Web site in area where people can send comments to Rich.

How do we get others involved that wish to be involved?

### **Team Strategies**

Facilitate the implementation of management actions

Bring in partners (other Federal, State, Tribal, and nongovernmental organizations)

Team acts as coordinator, facilitator, catalyst, and supporter of initiatives

Reach out to other ecosystem teams, partner with them, tap into their partners

Suggest that the format for the Strategic Plan be something like:

#### **Mission**

#### **Objectives**

#### **Issue 1**

##### **Background**

##### **Strategies**

Most strategies will include revenue acquisition

##### **Goals** (quantitative, if possible)

Measure of success

Intermediate goal(s), if appropriate

Measure of success

#### **Issue 2** (same as above)

The strategies for some of the issues will include the need to maintain active committees that are charged to meet the goals.

### **BENEFITS OF TEAM MEMBERSHIP**

What are the benefits of having Team involvement?

Calculate the number of years of experience of Team members, also diversity/partnership index—quantify partnerships, networking

Ready-made network, proven track record, nexus among natural resource disciplines (goes in vision?)

Venture team/social capital, other “buzz words”

Also, the 4 Cs and other Administration priorities – how the Team addresses Administration priorities, and how the Ecosystem Team concept has been embraced over the years.

Team tools and the importance of getting the message out to target audiences. Importance of helping to shape the message and get more sophisticated in doing outreach—get to Congress, news media, other communication venues.

Capitalize on expertise with doing outreach that exists within the Team currently.

Get team members to think about outreach and plan outreach activities with every project.

Access to Great Lakes Network!!



Advantage of high population, human issues, key natural resources – Ecosystem Team can make projects more visible to this population, make the Service a leader in the basin.

Team's advocacy, endorsement, coordination, communication, visibility capabilities.

**NEXT STEPS:**

Go back out to the whole Team, present action plans, invite their input, tell them how we can help and find out whether what they need help on fits in with what we can offer. Let them see the ways we have helped other team members.

Use a listserve or the Internet to communicate about Team projects/initiatives.

End of year “crumbs”–use leftover end of year money to reward those who have helped move the Team/Service's objectives forward – give an infusion of cash to Teams/Stations that have gotten results on projects. “Give us the money and we'll show you results.”

Distill today's notes down to an agenda and hold a conference call among the full Executive Committee. Use this time to go over Action Plans from Committees. Don't spend a lot of time on this but identify actions that might benefit the Team and make ourselves aware of what activities the Committees are planning to undertake. Actions in some plans may complement each other–create synergy among Committee activities.

Discuss changing format of Team meetings? One-nighter vs. conference call. Need to be flexible given uncertain budgetary times. Think about more convenient locations, ability of Team members to attend. Flying versus driving, holding meeting in central location. Using state university facilities, etc. Opportunities to piggy-back onto other meetings that are already scheduled? Utilize web and video conferencing tools as they become available.

Focus on what makes sense for the Team and then deal with the when, where, details.

**ACTION ITEM:** Develop items for discussion at potential full Team meeting and determine best venue for discussing those items–meeting versus call, length of meeting, video conferencing.

**ACTION ITEM:** Determine where more central points are in the Great Lakes Basin, determine where cheaper per diems are, where it is cheapest to fly into. Detroit? Could task a local office with finding cheap housing, meeting space.

**Role, Composition of Full Team:**

A communications, partnership network? A resource base, that can choose to contribute to various Team functions as needed, desired?

**Steering Committee:**

Larger than Executive Committee, seek representation from each Program in both Regions. Keep membership open, to encourage infusion of new energy and ideas. Would formulate ideas for Executive Committee, and Team as a Whole. Would allow better communication cross

Program and cross Region, allowing better focus on priority issues, addressing issues, avoiding duplication of efforts and expenditure of limited resources.

Region 5 Migratory Bird Program has assigned a Programmatic representative to each of it's Ecosystem Teams.

**ACTION ITEM:** Pursue with Region 3 Regional Management Team, and Region 5 Regional Directorate Team having a representative from each Program assigned to our Team.

**Role of a Steering Committee:**

New name only or new functions? Could play lead role for “incubating” ideas, form nucleus of “doers”, include reps from states, tribal, hook and bullet groups, ngo's, other partners, would meet/web or phone conference on somewhat regular basis, perhaps quarterly to keep things active, pro-active. Possibly seek membership/representation from each Program from both Regions.

**Role of Executive Committee:**

Decision-maker in absence of full team, past/future/current leaders, biologist, committee chairs, other interested parties. Have regular conference calls, get critical mass to make decisions. Keep things moving between meetings. Representative of team interests.

Perception that Executive Committee has become self-regulating close-knit group that decides priorities for whole team. Solution: invite people w/this concern to Executive Committee meeting to see what we do. Ask them for suggestions on how to improve Executive Committee workings.

Keep purpose focused, on decision making, acting for full Team.

Having a dedicated Ecosystem Team Biologist and an Ecosystem Outreach Specialist is a huge help! Project Leaders may be too overburdened to complete tasks, Team Biologist can help keep things on track, Outreach Specialist get the word out on needs, issues, actions, and accomplishments.

Two separate teams—executive and steering? Executive Committee is decision making team, Steering Committee helps move projects along, identifies issues and opportunities, and facilitates communication and coordination.

Working with tribes—should we be doing more, and what and how? John Leonard has concerns. Membership is open, we send announcements to tribes, have had participation but could be improved.

**ACTION ITEMS:** Compile updated master list of all Team members, post on Team Web Site. Mike Hoff and Rich Greenwood for full Team and Executive Committee. Due date: ??

Committee chairs compile updated lists of Committee members; send to Anjanette to be posted on Web. Due date: ??

Bob Krska look for, and provide document describing roles of Executive Committee.

Keep name Executive Committee for now, leave ourselves open to forming a separate Steering Committee, or to forming a subset of people to steer particular projects as needed. Seek Region 3 and 5 Directorate Management input, concurrence, and commitment.

Form ad hoc group to design briefings for Robyn Thorson and new R5 Regional Director. To assist Mike and Rich in re-working Team PowerPoint presentation.

Milestone Tracking System - Great Lakes Calendar.

Funding Support Initiative.

Great Lakes Research, Information, and Action Needs and Priorities, compile and make available.

Compile Fish and Wildlife Service Great Lakes Roster, with contacts identified for internal, public, and partners benefit and use. We have numerous individuals and Stations that are the leads and contacts for numerous Great Lakes initiatives, such as: Binational Executive Committee, SOLEC Steering Committee, SOLEC Indicator Leads, U.S. Policy Committee, Great Lakes Fishery Commission Lake Technical Committees, Lake Wide Management Plan Work Groups and Management Committees, Great Lakes Aquatic Nuisance Species Panel, etc..